



**Request to Purchase Prior Military Service**  
**Public Employees' Retirement Fund**  
**Teachers' Retirement Fund**

**Social Security Notice**

According to the IRS Code, Section 6041 (A), PERF and TRF are required to obtain your Social Security Number. This form cannot be processed without all of the necessary information.

I am a member of (select one):

☐ Public Employees' Retirement Fund

☐ Teachers' Retirement Fund

**Part 1**

**Applicant Information and Authorization to Release Information**

I authorize the release of any and all information as requested by the Fund pertaining to my request to purchase prior military service credit with the Fund.

Applicant Name: Last Name, First Name, Middle, and Maiden Name (if applicable)			TRF Number (TRF members only)
Social Security Number		Date of Birth	
Address			
City	State	ZIP	Phone Number
Signature		Date	

**Part 2**

**Service History (Must be accompanied by DD214 )**

Service Branch	Start Date of Service	End Date of Service	Total Service (Years/Months/Days)

**Part 3**

**Current Employer Information**

This certifies that the above named individual is employed by us in a PERF or TRF covered position.	Title of Position
Hire Date	Annual Salary
Signature of Authorized Agent	Date
Printed name of Authorized Agent	Phone Number
Employer Name	Employer Account Number

**Note: Base Annual Salary should be given exclusive of overtime, lump-sum bonuses, travel allowances, etc.**

# Determining Your Eligibility and Completing this Form

Please read carefully and follow all instructions.

Indiana Code IC 5-10.3-7-5 and 21-6.1-4-6.1 permit members to purchase credit for up to 2 years of prior military service with the Public Employees' Retirement Fund or the Teachers' Retirement Fund .

This service may not be used in claiming a retirement or disability benefit until payment in full has been made and you have accumulated ten [10] years of service not including any purchased military or out-of-state service.

## **Qualifications**

In order to purchase this credit you must meet the following criteria:

- 1) You must be currently employed in a PERF or TRF covered position and have at least one year of service credit.
- 2) You must have served on active duty in the armed services of the United States for at least 6 months (only 2 years of service may be purchased).
- 3) You must have received an honorable discharge from the armed services.
- 4) You must be able to provide a DD214 for each period of service you wish to purchase.

The armed services of the United States include the United States Army, Navy, Air Force, Marine Corps, and Coast Guard.

## **Procedures for Purchase of Service**

If you meet these criteria, please complete Part 1 and 2 of this form. Have your current employer complete Part 3. When all parts are complete, please return the form to the following address. *Be sure to include copies of all DD214s covering the service you wish to purchase.* We will complete the calculate the cost of the service and return a purchase agreement to you. If you wish to purchase the service, you must complete the agreement and return it to the address below together with your payment.

Payment may be made in a lump sum or in installments for a period not to exceed five (5) years. Any installment shall bear interest at the actuarial rate effective on the date of the first installment. Any payments are subject to applicable Internal Revenue service limits and the fund may adjust any payments in a manner necessary to comply with those limits. In addition, the fund may deny an application for the purchase of military credit if the purchase would exceed the limitations under Section 415 of the Internal Revenue Service Code.

## **Refunds**

If you purchase service and elect to withdraw from the fund prior to becoming vested (with 10 years of service), the amount you have paid plus accumulated interest will be refunded to you.

### **PERF members send this form to:**

**Public Employees' Retirement Fund  
143 West Market Street  
Indianapolis, IN 46204**

### **TRF members send this form to:**

**Teachers' Retirement Fund  
150 West Market Street  
Suite 300  
Indianapolis, IN 46204**